

### **Remarks**

In response to the Office Action mailed on February 12, 2007, the Applicants respectfully request reconsideration based on the above claim amendments and the following remarks. Applicants respectfully submit that the claims as presented are in condition for allowance. Claims 2-6, 9-11, 23, 27 and 30-32 are pending. Claims 9, 23, 30 and 31 have been cancelled without prejudice or disclaimer. Claims 10 and 27 are amended.

### **Applicants' Statement of the Substance of the Interview**

A telephone interview was conducted on April 24 between Examiner Sterrett and Applicants' representative, Arno Naeckel. During the interview various claim amendments were discussed. It was agreed that quality guidelines needed to be recited as well as the customer classifications. The Examiner indicated that based on the changes discussed there may be allowable subject matter and requested written amendments and arguments. It was further discussed that generation of the report was based on the quality of the contact and that claim 27 would be amended to clarify as such to address the §112 rejection.

### **Claim Rejections - 35 U.S.C. §112**

Claims 2-6, 9-11, 23, 27 and 30-32 stand rejected under 35 U.S.C. § 112, second paragraph as failing to point out and distinctly claim the subject matter which the applicant regards as the invention. Specifically, the limitation citing the generation of a report that is utilized to track sales activities and to determine which entities to be contacted and in what order was indefinite. Claims 9, 23, 30 and 31 have been cancelled, therefore the rejections under §112 second paragraph in regard to claims 9, 23, 30 and 31 have been rendered moot.

Claim 27 has been amended to clarify that the report is generated based on the associated quality, classification and billing records. As such, claim 27 is now definite and the §112 rejection may be withdrawn. Claims 2-6 and 6-11 depend from an allowable independent claim 27 and the §112 rejection may be withdrawn for the same reasons.

### **Claim Rejections - 35 U.S.C. §103**

Claims 2-6, 9-11, 23, 27 and 30-32 are rejected as being unpatentable over the Upshot software product ("Upshot") in view of Melchione (US Pat. App. 5,930,764). Claims 9, 23, 30 and 31 have been cancelled and therefore the rejections under §103 as applied to claims 9, 23, 30 and 31 have been rendered moot. The rejection of remaining claims 2-6, 10-11, 27 and 32 is respectfully traversed.

#### Claims 2-6, 10-11, 27 and 32

Amended independent claim 27 specifies a method for retaining and using contact information. The method includes receiving a first item of contact information regarding a contact from one of a plurality of sales representatives via a graphical user interface ("GUI") displayed on a computer executing a software application; storing the first item of contact information in at least one searchable database in communication with the computer and associating the first item of contact information with a particular entity; classifying the contact by a quality classification the quality classification being indicated by one of a set of specific guidelines required by the software application indicating the value of the contact to the sales representatives, the set of guidelines including at least one of the following classifications:

- a Sales Visit, wherein a Sales Visit comprises an on site visit to promote a sale whether a sale occurs or not;

- a Sales Phone Call, wherein a Sales Phone comprises a telephone call to promote a sale whether a sale occurs or not;

- a Maintenance Visit, wherein a Maintenance Visit comprises an on site visit to explain one of a first bill and a product or service;

- a Maintenance Phone Call, wherein a Maintenance Phone Call comprises an telephone call to explain one of a first bill and a product or service; and

- Not a Quality Contact, wherein Not a Quality Contact comprises one of a telephone call and a visit to resolve an administrative issue;

receiving and storing information in the at least one searchable database, via the GUI, regarding the type of initial contact, wherein information regarding quality was also received about the particular entity; classifying the contact by an initial customer classification, the initial customer classification being indicated from a set of specific customer classes required by the software application including at least one of:

- a reactive contact class, where customers classified as reactive are those that have initiated contact with one of the plurality of sales representatives;

- a proactive contact class, where customers classified as proactive are those where a sales representative initiated the contact with the customer; and

- a target class, where customers classified as targets are those with no known relationship with the company but may be interested in services of the company;

receiving proactive contact information, via the GUI, in a plurality of data fields in the at least one searchable database, the proactive contact information comprising customer account information, customer identification information, and quality contact type information, the quality contact type information comprising at least one of customer visit information and customer telephone call information; tracking edits to the proactive contact information in at least one of the plurality of data fields including indicating when a last edit to the proactive contact information was made; generating at least one report associated with the proactive contact which is utilized to track sales activities, compare the performance of the one of the plurality of sales representatives with at least one established performance metric, and determine which of a plurality of entities should be contacted and in what order; classifying the one or more customers as a do not call customer, and if so, preventing the one or more customers on the do not call list from receiving solicitations from the one of a plurality of sales representatives; importing, electronically from a billing system, billing information associated with the particular entity in the at least one searchable database for review by the one of the plurality of sales representatives, wherein the billing information is associated with previously collected historical information associated with the one or more contacts and the one of the plurality of sales representatives; and providing the report based on the associated quality, classification and billing information in the at least one searchable

database via the GUI and a printout in a format indicating which particular entities should be contacted and in what order.

It is respectfully submitted that the combination of Upshot and Melchione fails to describe each of the features specified in amended independent claim 27. For example, among other deficiencies, the aforementioned combination of references fails to describe that the set of guidelines includes at least one of:

- a Sales Visit, wherein a Sales Visit comprises an on site visit to promote a sale whether a sale occurs or not;

- a Sales Phone Call, wherein a Sales Phone comprises a telephone call to promote a sale whether a sale occurs or not;

- a Maintenance Visit, wherein a Maintenance Visit comprises an on site visit to explain one of a first bill and a product or service;

- a Maintenance Phone Call, wherein a Maintenance Phone Call comprises an telephone call to explain one of a first bill and a product or service; and

- Not a Quality Contact, wherein Not a Quality Contact comprises one of a telephone call and a visit to resolve an administrative issue.

While the various Upshot references disclose deal tracking, sales history at a glance, and sharing sales information within a sales team (Upshot A, B and C), the Upshot A, B, C and D references do not disclose the use of customer contact quality criteria or customer classes as recited in independent claim 27 as recited in independent claim 27.

Melchione discusses a centralized customer management and sales lead system for banking institutions. Melchione describes a Central Information Customer System (CCIS) and a sales lead tracking system (MIS) that categorizes customers in a hierarchical system by household, customer and account. However, Melchione does not describe classifying and tracking customer contacts or the quality of the contacts nor by the classification as a reactive or proactive customer. Melchione also fails to describe generating a report based on the quality measures. Therefore, since neither the Upshot references nor Melchione describes each and every claim element, amended independent claim 27 is allowable over the combination of the Upshot references and Melchione. Claims 2-6, 9-11, 23, 28 each depend from amended independent claim 27 and thus specify at least the same features. Therefore, these claims are allowable for at least the same reasons.

**Conclusion**

In view of the foregoing amendments and remarks, this application is now in condition for allowance. A notice to this effect is respectfully requested. If the Examiner believes, after this amendment, that the application is not in condition for allowance, the Examiner is invited to call the Applicants' attorney at the number listed below.

No fees are believed due at this time. However, please charge any additional fees or credit any overpayment to Deposit Account No. 50-3025.

Respectfully submitted,

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/Arno T. Naeckel/

Arno T. Naeckel,  
Reg. #56,114

Withers & Keys, LLC  
P.O. Box 71355  
Marietta, GA 30007-1355  
(678) 565-4748